Release Notes

RetailManager v12

Welcome to MYOB RetailManager v12. This release has all the features you're familiar with, as well as new features to make managing your business easier. In order to start using RetailManager v12, you'll need to upgrade your current software.

Whats in this guide?

These Release Notes cover all the tasks you need to complete to start using RetailManager v12.

Section	See
What's new?	page 2
Getting started	page 8
Additional licences	page 19
Technical support	page 21
MYOB training options	page 24

MYOB Licence Agreement

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What's new?

The following new features have been included in this release.

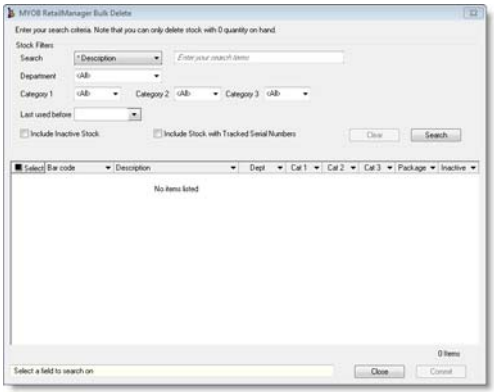
Feature	Description	See
Delete stock items in bulk	The new **Bulk Delete** feature makes it easier to delete unused stock from your stock list. You can use filters such as category types or the last used date to find the stock you want to delete.	page 3
Assign account numbers to stock	Assign income and cost of goods sold account to each stock item. Use this feature to track sales and cost to different departments.	page 3
Multiple customer addresses	You can now record up to three address details for each customer. You can then choose from these addresses when recording delivery details.	page 4
USB hardware support	RetailManager now supports USB hardware such as docket printers.	page 5
Print your address on documents	Choose to print your street address or postal address on sales, purchases or statements.	page 5
Delivery address on purchase orders	You now have more options when entering delivery addresses on purchase orders.	page 6
EFTPOS update	We've added and updated the EFTPOS terminals that work with RetailManager.	page 7
Extended email address field	You can now enter up to 60 characters into the customer email address field.	
MYOB AccountRight compatibility	If you export data from RetailManager, you can now selected MYOB AccountRight from the **Accounting Package & Export Directory** options .	

Delete stock items in bulk

The new **Bulk Delete** feature makes it easier to delete unused stock items.

Use search filters to find the stock you want to delete. You can search by description, department, category and the date the item was last used (not including stocktakes). For example, you could search for Homewares stock that haven't been used since 01/07/2008. And you can include inactive stock and stock with tracked serial numbers.

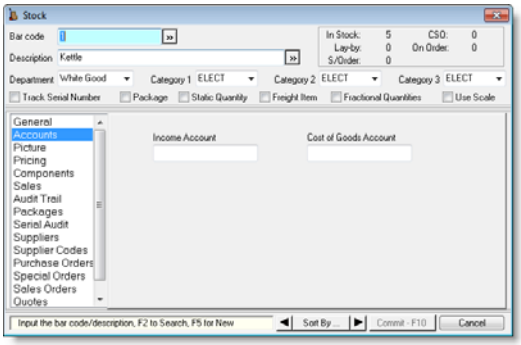
You'll find the **Bulk Delete** feature from the **Stock Management** menu.



Assign accounts to stock

You can now assign an income and cost of goods sold account to each stock item. This give you more flexibility and better tracking when you export information to your accounting software.

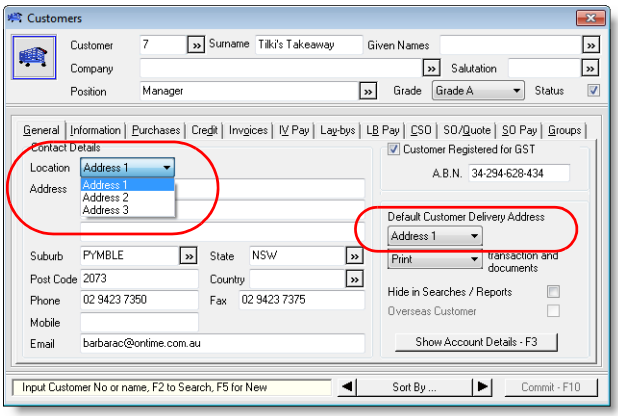
You enter these account details in the new **Accounts** tab in the **Stock** window.



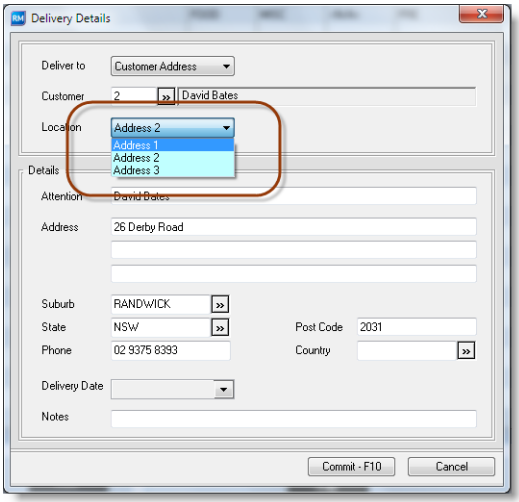
Multiple customer addresses

You can now record up to three addresses for each customer. For example, you can record a postal address, a shop address and a warehouse address.

You can also set the address you want as the default delivery address in the **Default Customer Delivery Address** field.



When recording sales, you can choose any of these addresses as the deliver address.

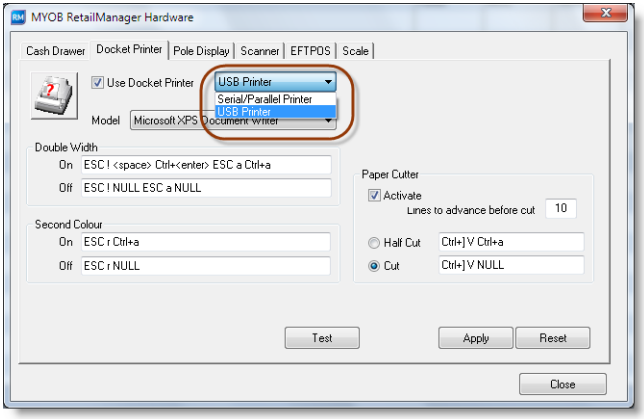


USB connectivity

RetailManager now works with the following USB hardware devices:

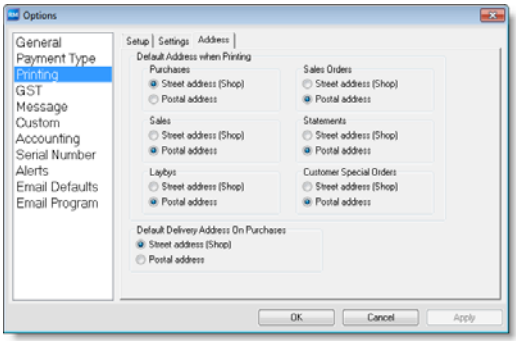
- UBS Printer
- USB Scanner
- Cashdrawer connected to a USB printer.

You select these options when setting up your hardware (**Setup** > **Hardware** menu).

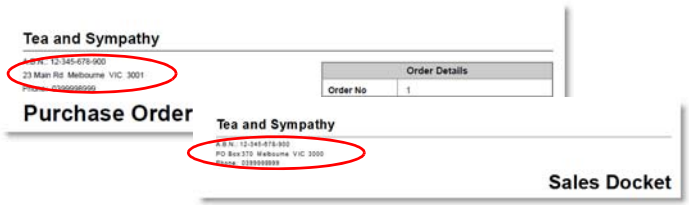


Print your street or postal address on documents

You can now print your street or postal address on sales, purchases and statements. You select the address you want to print in the **Address** tab of the **Printing** options (**Setup** > **Options** menu).



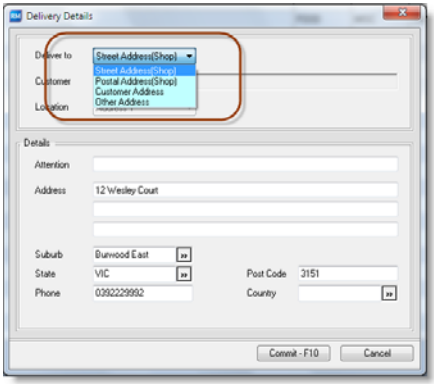
You can use this feature to print different addresses on each form type. For example, you can print your street address on your purchases and your postal address on sales.



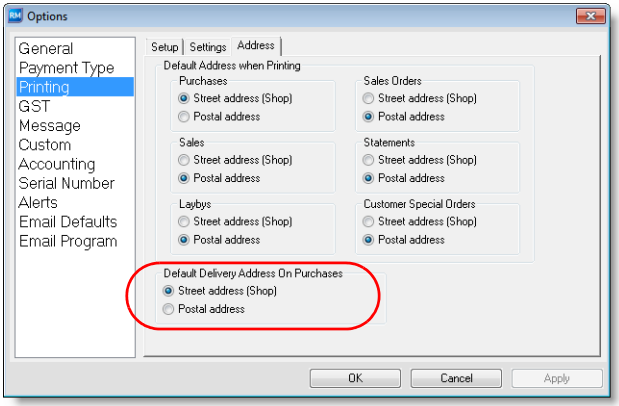
If you want, you can override the default setting when printing in the **Print/Email Options** window. Note that this changes the address for this printout only.

Choose a delivery address on purchase orders

When recording purchase orders, you can choose where you want to deliver the stock. You can delivery to your shop or postal address, or even directly to a customer.



You can also set default delivery address to use on purchase orders. You set this from the new **Address** tab of the **Printing** options (**Setup** > **Options** menu).



EFTPOS terminals updated

The following EFTPOS terminals have been added or renamed.

New

- Westpac (two-ways)
- MYOB EFTPOS

Renamed

- Westpac–Ingenico is now Westpac (one-way)
- INGENICO NPT 710 is now St George/Bank SA (two way)
- INGENICO NPT 700 is now St George/Bank SA (two way)
- Ingenico–PC-EFTPOS is now PC-EFTPOS
- NAB Eclipse is now NAB Integrated via PC-EFTPOS

Getting started

Do the following to get started with RetailManager v12.

Step		See
1	Check your system requirements and regional settings	below
2	Back up your shopfront	page 10
3	Uninstall your previous version of RetailManager	page 13
4	Install RetailManager	page 14
5	Upgrade your shopfront database	page 16

Do you need additional licences? Additional licences allow you to use RetailManager on a local network with more than one computer accessing the one shopfront database. For more information, see page 19.

Step 1: Check your system requirements and regional settings

Check that your computer meets the recommended system requirements. If you use RetailManager on a network, your computers should meet these requirements. For optimal performance, RetailManager should be used on a wired network.

Operating system	Windows® 7 Ultimate (Service Pack 1) Windows® Vista Ultimate (Service Pack 2) Windows® Vista Business (Service Pack 2) Windows® XP Professional (Service Pack 3)
Processor	Pentium® 4 processor (or equivalent) at 1.5 GHz or faster.
Memory	1 GB RAM or more.
Hard disk	15 GB or more of free disk space.
Display	1024 x 768 dpi resolution.
Printer	A local or network printer to print dockets, reports, etc. If you print bar code labels, a high-quality laser printer is recommended.

Mouse and keyboard	Windows-compatible mouse and keyboard.
Backup solution	We strongly recommend a backup solution such as a CD writer, a DVD writer or a USB storage device.

Check your Windows regional settings

You should have set your Windows regional settings when you first installed RetailManager. Check that you still have the following settings.

Numbers tab	• Decimal symbol is set to a decimal point • Number of digits after decimal is set to 2 • Digit grouping symbol is set to a comma • Negative number format is set to -1.1
Currency tab	• Currency symbol is set to $ • Decimal symbol is set to a decimal point • Number of digits after decimal is set to 2 • Digit grouping symbol is set to a comma
Date tab	• Short date style is set to dd/mm/yyyy

To check your regional settings

1 Open your regional settings window:

If you are using…	Do this…
Windows 7	1 Go to the **Start** menu and choose **Control Panel**. 2 Click **Region and Language**. The **Region and Language** window appears with the **Formats** tab open. 3 In the **Formats** tab, select your language and region from the **Format** list (for example, **English (Australia)**). 4 Click **Additional Settings**. The **Customize Format** window appears.
Windows Vista	1 Go to the **Start** menu and choose **Control Panel**. 2 Click **Clock Language and Region** and then click **Change the date, time, or number format**. 3 In the **Formats** tab, select your language and region from the **Current format** drop-down list (for example, **English (Australia)**). 4 Click **Customize this format**.

If you are using…	Do this…
Windows XP	1 Go to the **Start** menu and choose **Control Panel**. 2 Click **Regional and Language Options**. 3 In the **Regional Options** tab, select your language and region from the **Standards and formats** list (for example, **English (Australia)**). 4 Click **Customize**.

2 Check the setting in the **Numbers**, **Currency** and **Date** tab.

3 Click **OK**.

Step 2: Back up your shopfront

It's good practice to back up your shopfront before installing a new version of RetailManager. If you have customised bar code labels, you should back up these to.

We recommend that you save your back up in a location that you can easily find, such as a folder called RMSAFETY. If you need more information about backing up, see the 'Administration' chapter of the *User Guide*.

Do the following to back up your shopfront:

Step	Task	See
1	Create the RMSAFETY folder	page 11
2	Back up your shopfront	page 11
3	Back up your custom settings	page 12
4	Back up your custom bar code files	page 12

Create the RMSAFETY folder

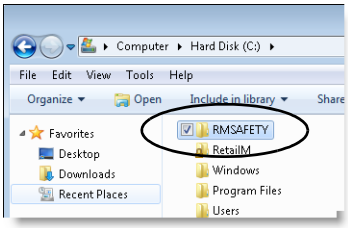
1 Open **Windows** Explorer.

If you are using…	Do this…
Windows 7	Right-click Windows **Start** and choose **Open Windows Explorer**. The Windows Explorer window appears. The window has two sections—a left pane and a right pane.
Windows Vista	Right-click Windows **Start** and choose **Explore**. The **Windows Explorer** window appears. The window has two sections—a left pane and a right pane.
Windows XP	Right-click Windows **Start** and choose **Explore**. The **Windows Explorer** window appears. The window has two sections—a left pane and a right pane.

2 In the left pane of Windows Explorer, click the icon of the drive on which you previously installed MYOB RetailManager (usually the C:\ drive). A list of folders is displayed in the right pane. If you already have an **RMSAFETY** folder, go to 'To back up your shopfront' on page 11.

3 Right-click in the right pane of Windows Explorer, choose **New**, and then choose **Folder**. A new folder is created in the right pane.

4 Type **RMSAFETY** as the name of the new folder and then press ENTER.



To back up your shopfront

1 Start your previous version of RetailManager.

2 Go to the **File** menu and choose **Configuration**. A message appears asking if you want to close your current shopfront.

3 Click **Yes**. The **Shopfront Configuration** window appears.

4 Click the **Maintenance** tab.

5 Select the shopfront to be backed up and click **Backup**. The **Save As** window appears.

6 Click **Save in**, and locate and open the **RMSAFETY** folder.

7 If you have:
- only one shopfront to back up, accept the file name and click **Save** (or **OK**).
- more than one shopfront to back up, type in a different file name and click **Save** (or **OK**).

A message appears informing you that the backup was successful.

8 Click **OK**.

9 Repeat step 5 to step 8 for each shopfront.

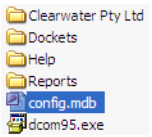
10 Close the **Shopfront Configuration** window. The **About MYOB RetailManager** window appears.

11 Click **OK** and close RetailManager.

To back up your custom settings

1 In Windows Explorer, open the folder in which your current version of MYOB RetailManager is installed (usually C:\RetailM).

2 Right-click the 'config.mdb' file and choose **Copy**.



3 In the left pane of Windows Explorer, right-click the **RMSAFETY** folder and choose **Paste**.

4 You should now have two files in the **RMSAFETY** folder—'config.mdb' and the RetailManager backup zip file.

To back up your custom bar code files

❖ If you have created customised bar codes, you will have a 'customlabel.def' file in the folder in which MYOB RetailManager is installed (usually C:\RetailM). Copy this file from the RetailManager folder to your newly created **RMSAFETY** folder.

Step 3: Uninstall your previous version

You must uninstall your current version before you install RetailManager v12.

To uninstall your previous version

1 Open the Windows control panel and display the list of installed programs:

If you are using...	Do this...
Windows 7 or Windows Vista	1 Click **Start** and then choose **Control Panel**. 2 Double-click the **Programs and Features** icon. The **Programs and Features** window appears.
Windows XP	1 Click **Start** and then choose **Control Panel**. 2 Double-click the **Add or Remove Programs** icon. The **Add or Remove Programs** window appears.

2 From the list of installed programs, select MYOB RetailManager v*x.x* (where v*x.x* is the version number of your RetailManager software).

NOTE: **Contact us** If you cannot see MYOB RetailManager vx.x in the list of installed programs, contact MYOB Technical Support on **1300 555 115**.

3 Click **Uninstall** (**Change/Remove** or **Add/Remove** on Windows XP) to begin the uninstall process. The **MYOB RetailManager Setup** window appears.

4 Choose **Remove** and click **Next**. A confirmation message appears.

5 Click **OK**. The uninstall process begins.

Information messages may appear during the uninstall process.

If this message appears...	Do this...
Read Only File Detected	Select the **Don't display this message again** option and click **Yes**. The application will continue to install.
Locked File Detected	Select the **Do not display this message again** option and click **Reboot**. You computer will restart after the uninstall process is complete.
Files failing to Self-Register	Click **OK**. This warning does not affect the installation.

6 If the **MYOB RetailManager Maintenance Complete** window appears, click **Finish**. The window closes. Your previous version has been removed.

Step 4: Install RetailManager

To install RetailManager

1. Before you start, close all open applications. When the installation process is complete, your computer will restart automatically.
2. Insert the RetailManager CD and wait a few moments. A welcome window appears.

   If a welcome window does *not* appear automatically, do the following:

If you are using...	Do this...
Windows 7 or Windows Vista	1 Go to the **Start** menu and click **Computer**. 2 Click your CD or DVD drive icon (usually labelled D:\ or E:\) in the right pane of the **Computer** window. 3 Double-click `autorun.exe`.
Windows XP	1 Go to the **Desktop** and double-click **My Computer.** 2 Double-click your CD or DVD drive icon (usually labelled D:\ or E:\). 3 Double-click `autorun.exe`.

3. Click **Install RetailManager**. The **Welcome to MYOB RetailManager Setup** window appears.
4. Follow the onscreen instructions.

   NOTE: If any warnings appear during installation, see 'Troubleshooting your installation' on page 15.

5. When the **Installation Complete** window appears, click **Finish**.

   Your computer will restart automatically.

   If your computer does not restart automatically, you should restart it manually.

   A shortcut to MYOB RetailManager appears on your desktop.

Troubleshooting your installation

The following messages may appear during the installation:

If this message appears...	Do this...
Read Only File Detected	Select the **Don't display this message again** option and click **Yes**. The application will continue to install.
Locked File Detected	Select the **Don't display this message again** option and click **Reboot**. The application will continue to install.
Files Failing to Self-Register	Click **OK**. This warning does not affect the installation of the software.

For help with resolving other installation issues, contact the MYOB retail technical support team. For more information, see 'Technical support' on page 21.

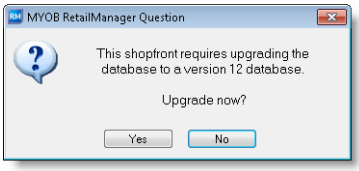
Task 5: Upgrade your shopfront

Now that you have installed RetailManager v12, you can upgrade your shopfro.

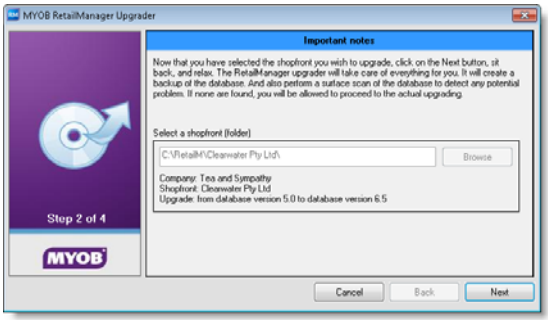
If you have...	Follow this procedure...
Only one shopfront	'To upgrade a single shopfront database' below
More than one shopfront	'To upgrade if you have more than one shopfront database' on page 17

To upgrade a single shopfront database

1 Start MYOB RetailManager. If a message appears asking if you want to back up now, click **No**. The following message appears.



2 Click **Yes**. The **MYOB RetailManager Upgrader** window appears.


MYOB RetailManager Upgrader
Important notes
Now that you have selected the shopfront you wish to upgrade, click on the Next button, sit back, and relax. The RetailManager upgrader will take care of everything for you. It will create a backup of the database. And also perform a surface scan of the database to detect any potential problems. If none are found, you will be allowed to proceed to the actual upgrading.
Select a shopfront (folder)
C:\RetailM\Clearwater Pty Ltd\
Browse
Company: Tea and Sympathy
Shopfront: Clearwater Pty Ltd
Upgrade: from database version 5.0 to database version 6.5
Step 2 of 4
MYOB
Cancel
Back
Next

3 Click **Next**.

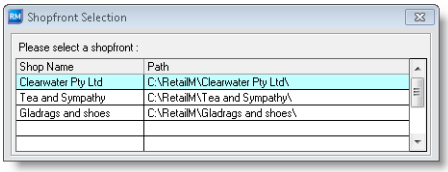
The upgrade process begins. During this process, do not turn off your computer or close the upgrader.

4 When the **Upgrade Completed** window appears, click **Finish**. A message appears asking if you want to upgrade another shopfront.

5 Click **No**. You have finished upgrading your database.

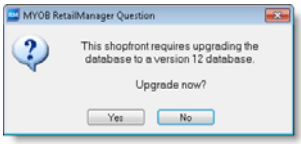
To upgrade if you have more than one shopfront database

1 Start MYOB RetailManager. The **Shopfront Selection** window appears.

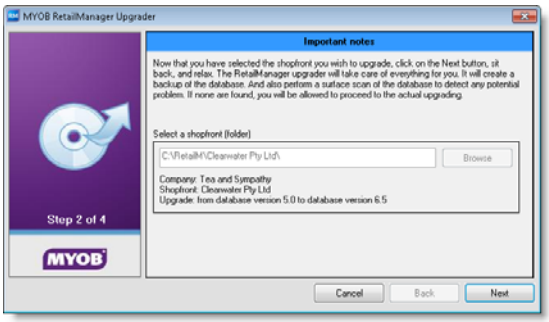


2 Open a shopfront. The **About RetailManager** window appears.

3 Click **OK**. If a message appears asking if you want to back up now, click **No**. The following message appears.



4 Click **Yes**. The **MYOB RetailManager Upgrader** window appears.


MYOB RetailManager Upgrader
Important notes
Now that you have selected the shopfront you wish to upgrade, click on the Next button, sit back, and relax. The RetailManager upgrader will take care of everything for you. It will create a backup of the database. And also perform a surface scan of the database to detect any potential problems. If none are found, you will be allowed to proceed to the actual upgrading.
Select a shopfront (folder)
C:\RetailM\Clearwater Pty Ltd\
Browse
Company: Tea and Sympathy
Shopfront: Clearwater Pty Ltd
Upgrade: from database version 5.0 to database version 6.5
Step 2 of 4
MYOB
Cancel
Back
Next

5 Click **Next**.

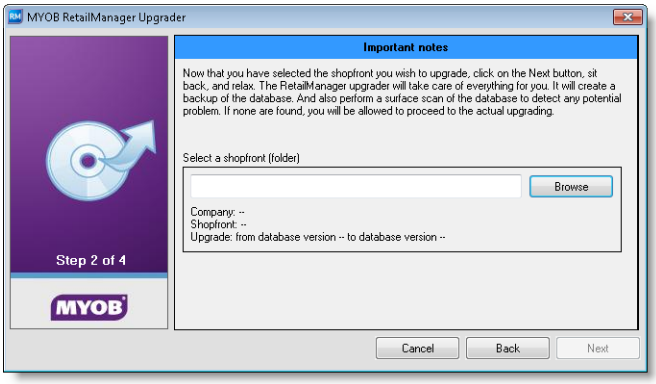
The upgrade process begins. During this process, do not turn off your computer or close the upgrader.

6 When the **Upgrade Completed** window appears, click **Finish**. A message appears asking if you want to upgrade another shopfront.

7 If you have finished upgrading your shopfronts, click **No** and ignore the rest of this procedure.

If you want to upgrade another shopfront, click **Yes**. The **Welcome to the MYOB RetailManager Upgrader** window appears.

8 Click **Next**. The following window appears.


MYOB RetailManager Upgrader
Important notes
Now that you have selected the shopfront you wish to upgrade, click on the Next button, sit back, and relax. The RetailManager upgrader will take care of everything for you. It will create a backup of the database. And also perform a surface scan of the database to detect any potential problem. If none are found, you will be allowed to proceed to the actual upgrading.
Select a shopfront (folder)
Browse
Company: --
Shopfront: --
Upgrade: from database version -- to database version --
Step 2 of 4
MYOB
Cancel
Back
Next

9 Click **Browse**. The **Browse for Folder** window appears.

10 Select the folder of the shopfront you want to upgrade and click **OK**.

11 Click **Next**. The upgrade process begins.

12 Repeat from step 6 until all your shopfronts are upgraded.

Additional licences

Many retail businesses need to run more than one point of sale in a store. You can use the same RetailManager shopfront database over a local network at the one location. Note that you need to purchase a licence for each computer on which you want to run RetailManager.

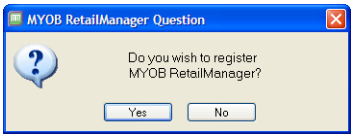
Follow the steps below to add licences to your shopfront network.

To purchase additional licences

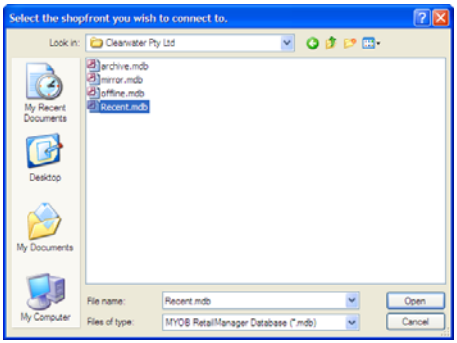
You can purchase additional licences by calling MYOB Retail Technical Support on **1300 555 115** and quoting your serial number. MYOB will provide an unlock code for each additional licence.

To enter unlock codes

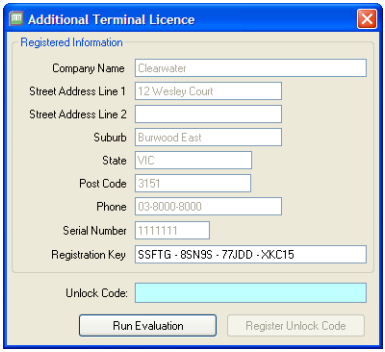
1. Install RetailManager on the computer you want to connect to your shopfront.
2. Start RetailManager on the additional computer. The following message appears.



3. Click **Yes**. A message appears asking if you have registerd RetailManager.
4. Click **Yes**, and then locate and open the shopfront folder on your network.



5 Highlight the `Recent.mdb` file, and click **Open**. The **Additional Terminal Licence** window appears.



6 Enter the unlock code for the additional licence in the **Unlock Code** field. Click **Register Unlock Code**.

The additional licence has now been registered. You will now need to connect to the shopfront. For more information, see the 'Networking' chapter in the *RetailManager User Guide*.

7 Repeat the above steps on other computers that you want to connect to your shopfront.

Technical support

Our retail technical support team can offer assistance with installing, using and troubleshooting MYOB RetailManager. However, support cannot provide assistance with issues arising from hardware or operating system faults, or incompatible hardware or software. You may need to contact an MYOB RetailManager Professional if these issues arise.

Retail technical support phone numbers and charges

Support Plan	Phone number	Available times (EST)	Charges
MYOB Cover	**1300 555 115**	9.00am to 7.00pm (Monday to Wednesday) 9.00am to 9.00pm (Thursday to Friday) 9.00am to 5.00pm (Saturday to Sunday)	Local call charges
Pay-Per-Call Support	**1300 555 128**	9.00am to 7.00pm (Monday to Friday)	Local call charges and Pay-Per-Call charges. To find out what our current Pay-Per-Call charges are, call **1300 555 115**.

Prepare before you call technical support

- Register your software. The technical support team will not be able to help you if you have not registered your software.
- Try to recall exactly what you did before the error occurred and note the *exact wording* of any messages that appear.
- Be ready to quote your serial number. (To find your serial number, go to **Help** > **About MYOB RetailManager**.)
- Call while sitting at your computer with RetailManager running (if possible).
- Be ready to follow the instructions and advice of the technical support staff and have a pen and paper ready to record instructions.
- Find out the following about your computer and RetailManager:
  - The version number of RetailManager. (To find your version number, go to **Help** > **About MYOB RetailManager**.)
  - Your computer type, processor and model and the version number of the operating system you are running. To locate this information, do the following:

If you are using...	Do this...
Windows 7 or Windows Vista	1 Go to the **Start** menu. 2 Right-click **Computer** and choose **Properties**. The **System** window displays the hardware and operating system details.
Windows XP	1 Right-click the **My Computer** desktop icon. 2 Choose **Properties** and then click the **General** tab. The **System Properties** window displays the hardware and operating system details.

Technical support options

MYOB Cover Maintaining your MYOB Cover subscription entitles you to:

- technical support seven days a week
- all upgrades and updates we release for your product
- regular communications including *Coverage*, our monthly e-newsletter
- exclusive discounts and special offers.

For the terms and conditions of MYOB Cover, visit myob.com.au/cover

Pay-Per-Call Support If you do not renew your MYOB Cover subscription, you can access MYOB technical support on a Pay-Per-Call basis. Pay-Per-Call Support is charged at a per-minute rate and a minimum charge applies. Prices and conditions are subject to change without notice and are available from MYOB by calling **1300 555 115**.

Support notes You can access a wide range of technical support notes at myob.com.au/supportnotes

Keep up to date with RetailManager on the Web The MYOB website (myob.com.au/retail) is updated frequently and contains the latest RetailManager information, news, and links to many useful resources.

Send us your feedback We welcome your suggestions for improvements and changes to RetailManager. Go to myob.com/ideas and complete the online form, or go to the **Help** menu and click **Send Product Suggestions**.

MYOB training options

MYOB RetailManager Professionals

MYOB RetailManager Professionals provide independent on-site assistance with MYOB RetailManager and associated products and services, including:

- Retail business system needs and analysis
- RetailManager installation, setup and implementation
- Point-of-sale hardware and peripheral solutions
- On-site training and support for RetailManager
- RetailManager database maintenance
- Integration with MYOB business management software.

As independent businesses, MYOB RetailManager Professionals offer a range of services.

To discuss your retail needs with an MYOB RetailManager Professional near you, visit the myob.com.au/possearch

MYOB Training and MYOB Approved Training Providers

If you want to know more about the new features in MYOB RetailManager or how RetailManager can improve the profitability of your retail business, enrol in an MYOB RetailManager course. An MYOB RetailManager course will show you how to set up your system correctly from the start, and how to use RetailManager's many features to help you improve your store's sales performance. You'll be trained using the latest version of RetailManager by MYOB professional trainers. In addition to an MYOB RetailManager training course, independent classroom-based training is available through our network of MYOB Approved Training Providers.

For more information about your training options, visit myob.com.au/training